Caltech

About This Report Guide

This Report Guide is specific to the report. For information on OBI functionality (e.g., how to customize or export reports) or data logic, please see the other guides available on the *Help* tab.

This report guide includes:

- An overview of the report.
- Data security applied to the report.
- The parameters for the report.
- Sections and the columns included in the report.

Report Overview

The *AiM WO Costs* report reflects transactions associated with AiM Work Orders that have been interfaced to Oracle Grants. Only AiM work orders are included. This report does not include any historical FAMIS work orders. The report can only be run for a single work order (and all associated phases) at a time.

The report includes detailed information about the work order and the phase(s) organized in three sections:

- Section 1: Includes the WO # and WO Description.
- Section 2: Includes additional information about the Work Order.
- Section 3: Includes the cost information by Work Order Phase.

NOTE: The full list of included columns is below.

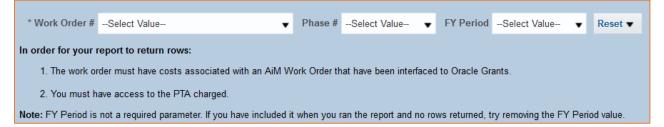
Data Access

The security for the report is at the same PTA-level as the other *Cost Detail* reports. If you do not have access to all PTAs charged for the Work Order, then you will not see all transactions associated with the work order.

Report Parameters

The report has three possible parameters:

- 1. Work Order #: Required.
- 2. Phase #: Values based on the Work Order # selected.
- 3. FY Period: Not required, but helpful for long-standing work orders.



Report Columns

Section 1

- Work Order #: The number associated with the work order request. Column header: *None*
- Work Order Description: The description of what needs to be done. Column header: None

Section 2

- Work Order Extra Description: AiM has a limited number of characters available, so any further information is put into this field.
 Column header: None
- Work Order Status: Current status of the work order. Column header: *Status*
- Work Order Problem Type: Identifies the type of support that is needed from Facilities, e.g., Housing, Planned, and Support.
 Column header: Type
- Work Order Category: Works with *Type* to further classify the type of action necessary, e.g., *Custodial, Emergency, Routine, and Services.* Column header: *Category*
- **Problem Code:** Used to facilitate data entry and shop assignment of the Work Order.
- **Customer Contact:** The person requesting the work, i.e., who Facilities would contact if they had a question about the request.
- Work Order Project: A number used to group a collection of Work Orders. Column header: *Project*
- Building #: The number associated with the building in which the work is being done.
 Column header: Bldg #
- **Property Description:** Description of the property or building at which the work is being done.

Section 3

- Work Order Phase: A work order can have multiple phases. The Work Order Phase is the number associated with that phase.
 Column header: WO Phase
- **Phase Status:** Current status of the work order's phase.
- Phase Description: The description of what needs to be done for each specific phase of the work order.
- **PTA:** The Project #-Task #-Award # charged for each cost.



- **Expenditure Type:** The expenditure type associated with the cost.
- **Expenditure Item Date:** The date associated with the original transaction. Column header: *Exp Item Date*
- **FY Period:** The financial period in which the transaction was costed in Grants.
- **Cost:** The amount of the transaction.